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ADEN.

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The Aden consular district includes the port of Aden, a few small Arab towns on the desert mainland, and the 80 square miles of arid and mostly unproductive territory comprising the British colony of Aden (which includes Perim). The total population is about 50,000. The entire Red Sea district is, however, more or less under the commercial influence of Aden. The principal political divisions directly or indirectly included within the Aden commercial district are Eritrea; Abyssinia; French, British, and Italian Somalilands; Arabian Red Sea Provinces; and the Aden hinterland which extends eastward a considerable distance along and beyond the Gulf of Aden. These various political divisions, including Aden, have an approximate total area of 850,000 square miles, and an estimated population of from 12,000,000 to 15,000,000.

Industries in the Aden Commercial District.

Throughout the Red Sea district the only manufacturing industries of importance are the production of salt by evaporating sea water and the making of cigarettes on a comparatively small scale.

The principal industry in the district is stock raising, the largest export items of Aden being hides and skins. In the Arabian Red Sea Provinces, mainly the Yemen, where the country rises to a sufficient elevation above the desert coastal plains to receive rainfall, the world's supply of Mocha coffee is grown. The Abyssinian highlands also contribute important supplies of coffee to the district's exports, and the potential importance of that country as a source of supply for agricultural products is great. Excepting the Arabian, Abyssinian, and smaller Eritrean highlands, the district is mostly arid or semiarid and of little promise agriculturally.

Products of the district that are more or less important in its trade, other than skins, hides, and coffee, are gums of various sorts, beeswax, ivory, civet, and senna leaves. In the Red Sea and the Gulf of Aden there are shell-fishing beds which contribute an appreciable amount of pearls and mother-of-pearl shells to Aden commerce. Some minor fisheries products, such as sharks' fins, are produced.

Imports of Foodstuffs and Manufactured Goods.

Because of the lack of conditions favoring agriculture a large part of the food supply, excepting meat, must be imported into all parts of the district outside of Abyssinia. The principal foodstuffs imported are grains from India, dates from the Persian Gulf, and sugar and spices.

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The needs of the market for manufactured goods are simple, being confined more or less to necessities. The leading import item, which is more than one-third of the total imports, is made up of various classes of cotton textiles, principally unbleached sheetings, drills, and jeans. Other imported manufactured goods are cotton twist and yarn, jute bags, soap, metals, wearing apparel, boots and shoes, hardware and cutlery, and glass and glassware. For highly manufactured goods and luxuries the demand is unimportant. There is developing a market for automobiles and auto accessories and for machines and machinery of various sorts.

No coal or lumber is produced in the district, and imports of these two commodities, as well as of kerosene, reach an important figure.

Importance of Aden as a Port.

Aden is a port of call for many shipping lines and enjoys the larger share of the total import and export trade of the district. It is a free port, except for a tax levied upon the importation of alcoholic liquors or preparations and upon intoxicating drugs. The importation of arms and ammunition is restricted.

There is an excellent harbor at Aden and all necessary facilities for coaling and provisioning ships. Cargo is handled promptly and at reasonable charges, although there are no docks to which ships can go and all cargo must be handled with lighters. The Aden Port Trust has an extensive series of wharves and warehouses for the handling of merchandise.

Jibuti is the port of entry for the large Abyssinian trade and is probably next in importance to Aden. Jibuti also has excellent harbor facilities. Cargo is handled with lighters, but the work is done promptly and at reasonable charges.

Other Ports of Aden District.

The third port in the district which has steamship connections direct with foreign markets is Massaua in Eritrea. This port is largely confined to Italian business, however, because of preferential duties. Italian merchandise pays an import duty of 1 per cent, as against 8 per cent if of other origin. Exports to Italy pay an export duty of 1 per cent, but if to other parts they pay 8 per cent. Of imports at Massaua in 1916, totaling more than $4,000,000 in value, $100,294 worth was received directly from the United States. Exports from this port to the United States in 1916 were a little more than double that amount in value. Massaua is a port of entry and of exit for an appreciable share of Abyssinian trade.

Other ports in this commercial district, which are used mainly for local trade carried on by small steamers and sailing dhows, are Berbera, Bulhar, and Zeyla in British Somaliland; Makalla and Shukra on the Arabian side of the Gulf of Aden; Hodeida (now closed), Meidi, Ghizan, and Jeddah on the Arabian side of the Red Sea, and Assab on the African side of the Red Sea. In Italian Somaliland and down the East Coast of Africa are Alula, Mogadishu, and Kismayu.

Transportation Facilities.

In normal times the transportation facilities by sea between Aden and the various small ports in the commercial district are ample, but

war conditions have greatly reduced them. Many small steamers formerly in the coasting trade have been withdrawn for other uses, and the use of sailing dhows is greatly restricted.

Inland transportation throughout the Aden district is with two exceptions done entirely with pack animals, use being made of camels, mules, or donkeys, according to the nature of the territory. The two exceptions are the Franco-Ethiopian Railroad from Jibuti to Adis Abeba, and the railroad from Massaua to Asmara, the capital of Eritrea. The first-named road was started in 1897 but was not completed until after the beginning of the war. Its length from the coast to Adis Abeba is 786 kilometers (488.39 miles). It is the main trade route to and from Abyssinia and maintains both a passenger and a freight service. Freight rates are expensive and so are not conducive to the fullest development of trade.

The Massaua-Asmara railroad has a length of about 125 kilometers (77.67 miles), and it is being carried farther inland to Keren, 50 kilometers (about 31 miles) from Asmara. This is a well-equipped railroad and has been a great aid to the commercial development of northern Eritrea, which carries on a somewhat extensive caravan trade with Abyssinia and the Sudan.

Although not exactly within the Aden commercial district, mention may be made of the railroad connecting the Red Sea ports of Suakin and Port Sudan with Khartoum, from which place there is a trade route by river steamers into southern and western Abyssinia, via the river Sobat and the trading station of Gambela. An appreciable amount of Abyssinian trade follows this route.

Practically all other trade routes in the district are caravan trails. The average camel load by caravan routes is 450 pounds, and the average mule load is about 180 pounds. A mule is expected to travel 15 miles a day with a full load, and a camel 12 miles.

Packing of Goods for Red Sea Markets.

In general the packing of American goods imported into the Aden district has been found quite satisfactory.

Special attention, however, should be given to goods which are likely to reach inland markets by caravan. The contents of large packages prepared for sea shipment should be made into smaller units which are of proper weights for loading on pack animals without the necessity of breaking original packages. The average load, already mentioned, is usually divided, one-half for each side of the pack saddle.

Boxes should be of strong wood but not too heavy, as caravan transportation is expensive. Bales are much preferred, and a heavy jute cloth is the best wrapping. The contents of either boxes or bales should have, if possible, an interior wrapping of some strong damp-proof oil paper or cloth, as there is sometimes a great deal of dampness in the highland districts of Abyssinia and Arabian Red Sea Provinces, and as merchandise carried in sailing sometimes gets a good deal of salt-water spray. Boxes and bales somewhat oblong in shape are preferred for interior transportation.

Cotton-piece goods, which are the principal lines of manufactured goods from America reaching this market, need no special attention,

as the bales are usually well protected and are of such a weight that two, one on each side of the pack saddle, can be carried by a good camel. Bales of piece goods could be made even a bit heavier by placing 30 pieces to the bale instead of the usual 25 pieces.

Distribution of Imports—Collection of Produce for Export.

At all the places discussed under preceding headings the large Aden firms have agencies. Imported manufactured goods are distributed from Aden to these agencies, which in turn distribute them to traders in their territory. The agencies buy hides, skins, coffee, and other produce of the country, sometimes bartering imported merchandise for these commodities, and usually ship them to Aden for export to the foreign markets. In recent years, however, there has developed a tendency toward direct trade. While the Aden merchant still controls the trade to a considerable extent, he often exports directly from one of the small ports where his agency may be and, when possible, has the foreign manufactured goods delivered direct to the smaller ports.

The most noticeable departure from the former method of importing and exporting through Aden has been in the Abyssinian trade through Jibuti. Imports of manufactured goods for the Abyssinian markets and exports of Abyssinian produce are now frequently shipped direct between Jibuti and the foreign market.

Shipping Service Between Aden and Jibuti.

Abyssinia is the most important market in the district, and probably half of Aden's trade depends upon it. A serious handicap to Abyssinian trade through Aden during the latter half of the last calendar year was the sinking of a small steamer which made one trip each way per week between Jibuti and Aden. This steamer has not been replaced and, as the free movement of sailing dhows is restricted, the movement of both the import or the export trade via Aden has been curtailed. An Aden shipping company occasionally diverts one of its small coasting steamers from a regular run to make the trip between Jibuti and Aden. The steamer is usually loaded to its full capacity and earns a handsome profit. This service, however, is not adequate. It is understood that the regular service has not been resumed because of the inability of the shipping company which formerly maintained it to secure another steamer. A 500-ton vessel would be the most economical for the run, as there is a dull season during each year. The distance from Aden to Jibuti is only 135 nautical miles.

Trade in 1916-17 Largest in History of Aden.

Notwithstanding the many obstacles to trade activity which have grown out of the war, the trade of Aden has continued to increase each year. The official year 1916–17 shows the highest trade figures during the history of the colony. The total sea-borne trade of Aden for this year was valued at $48,275,046, including treasure, which is an increase of $13,273,743, or 37.9 per cent, over the preceding year. The following table compares Aden's total trade for 1914–15, 1915–16, and 1916–17:

Items.	1914–15	1915–16	1916–17
Imports:			
Merchandise	$15,200,389	$17,010,190	$23,622,535
Treasure	1,995,230	1,305,702	2,209,935
Exports:			
Merchandise	12,674,712	14,794,477	20,292,092
Treasure	2,601,368	1,899,234	2,150,574
Total	32,472,699	35,001,303	48,275,046

Decrease in Inland Trade and Trade With United States.

There has been a steady decrease of inland trade, owing mainly to military operations that have closed some of the caravan routes over which Aden's trade with the hinterland passes. In 1914–15 the total value of this trade was $1,253,803, in 1915–16 it was $769,265, and in 1916–17 it fell to $679,059. There will undoubtedly be a larger decrease for the current official year of 1917–18.

One of the outstanding features of Aden trade for the year under discussion was the large decrease in trade credited to the United States. Exports to the United States decreased from $2,427,764 in 1915–16 to $2,360,260 in 1916–17, that country dropping from first to third place in Aden export trade. Imports of American goods fell, according to the Aden Port Trust figures, from a value of $2,595,600 in 1915–16 to $1,113,975 during the year under review, a figure much lower than that for any preceding year since 1910–11. In 1915–16 the United States ranked second in Aden's import trade but during 1916–17 dropped to sixth place.

In 1915–16 American trade with Aden was 15.8 per cent of the whole, while India, the only country having a greater percentage of the total, was credited with 20.2 per cent. During the year under discussion American trade represented only 7.91 per cent of the whole. India was credited with 28.8 per cent of the total trade, Abyssinia (via Jibuti and Obok) with 13.91 per cent, and the United Kingdom with 13.04 per cent. More than 50 different countries or places participated in Aden trade during the year.

Of the places having the largest trade with Aden, the United Kingdom, India, British Somaliland, and Jibuti show the largest increases; the United States and Arabian Gulf and Red Sea ports show the largest decreases.

Trade by Countries for Three Years.

The following table shows the value of Aden's import and export trade by countries and ports in 1913–14, 1915–16, and 1916–17:

Countries.	1913–14	1915–16	1916–17
IMPORTS.			
India (excluding Burma)	$5,128,296	$5,408,422	$11,226,274
United Kingdom	1,900,532	1,991,424	2,625,975
Jibuti	2,236,548	1,806,861	2,306,070
United States	1,636,070	2,595,600	1,113,975
Austria	1,332,102	3,630	14,045
Somaliland	1,226,173	1,114,583	1,391,111
Independent Somali ports	408,838	285,544	371,669
Hodeida	967,534	2,663	.....
Arabian Gulf ports	493,450	407,142	426,655
Turkey	365,831	233,683	253,274
Italian East Africa	352,277	104,076	220,591
Mocha	390,985	1,311,515	101,997
Abyssinia	263,762	351,558	2,391,441

Countries.	1913–14	1915–16	1916–17
IMPORTS—continued.			
Mozambique	$34,778	$201,773	$801,467
All other countries	1,611,668	1,191,716	377,991
Total	18,238,844	17,010,190	23,622,535
EXPORTS.			
United States	2,136,480	2,427,764	2,360,259
Jibuti and Obok	1,491,063	2,301,565	3,801,570
Mocha	721,239	2,008,638	34,749
United Kingdom	1,465,134	1,064,554	3,101,705
Somaliland	1,020,634	832,154	1,493,677
Independent Somali ports	389,612	193,812	313,392
Italy	375,056	811,319	252,205
France	1,157,642	754,617	380,990
Suakin and Port Sudan	107,625	689,610	945,460
India	836,984	995,474	1,420,758
Arabian Gulf ports	793,696	632,155	873,293
Italian East Africa	442,736	504,104	419,360
Egypt	396,484	463,182	.....
Zanzibar and Pemba	148,881	226,806	356,748
Abyssinia	585,018	192,062	1,258,331
Germany	393,033	.....	.....
Austria	319,215	.....	.....
Hodeida	1,658,052	.....	.....
All other countries	1,440,411	696,661	3,279,505
Total	15,878,995	14,794,477	20,292,002

Land Trade of Aden—Imports by Sea.

The land trade of Aden is carried on principally by camel caravans. In 1916–17 the total number of camel loads of goods entering was 77,599, as compared with 92,285 in 1915–16, and 166,603 in 1913–14, the last complete year before the war. The value of imports by land in 1916–17 was $643,838, as compared with $523,138 in the preceding year, the increase being accounted for by greater imports of grass and forage and of raw skins. Exports by land decreased from a value of $246,226 in 1915–16 to $35,220 in 1916–17. One principal cause for the large decrease in exports was the restriction put into effect to prevent supplies reaching the Turkish military forces in the Yemen. During the past calendar year there has been a considerable restriction of the import trade by land, the importation of coffee and skins being especially restricted; and it is probable that the current official year will show a decided decrease in the land trade, both import and export.

Aden imports by sea for the official year 1916–17 had a total value of $23,622,535, as against a value of $17,010,190 for the preceding year, an increase of nearly 39 per cent. This is the highest figure reached by imports in the history of Aden trade. The increase in values was, of course, proportionately greater than the increase in quantities.

According to the Aden Port Trust returns, there were 72 different countries and places contributing to the Aden import trade.

One of the main reasons for the remarkable increase in this trade is that many shipping lines which formerly visited the smaller ports in the district have been forced by war conditions to discontinue that service. Accordingly much of the merchandise which formerly was beginning to be shipped direct has come to Aden for transshipment.

Chief Articles of Import.

The principal increases in the list of imports were in cotton piece goods, coal, skins, grain and pulse, tobacco, sugar and confectionery,

and hides. The only important decreases were in coffee, cotton twist and yarn, and kerosene oil.

The following table shows the value of the leading articles imported into Aden during 1913–14, the last complete year before the war, and during 1915–16 and 1916–17, the two latest years for which figures are available:

Articles.	1913–14	1915–16	1916–17
Cotton manufactures:			
Twist and yarn	$310,292	$428,861	$145,649
All other	3,436,253	4,124,852	8,176,304
Grain and pulse	2,549,915	1,680,131	2,104,380
Coffee	1,957,015	1,868,476	1,144,195
Skins, raw	1,842,499	1,698,614	2,551,105
Hides, raw	1,157,550	684,694	909,709
Tobacco	1,018,277	699,859	935,939
Coal	841,849	1,407,859	2,322,735
Sugar and confectionery	587,875	499,132	710,172
Fruits and vegetables	481,480	419,676	469,379
Provisions and oilman's stores	325,140	403,375	415,958
Oils	313,509	389,616	255,621
Gums and resins	294,443	241,084	285,525
Articles by post	288,626	177,555	159,175
Animals, live	252,098	289,705	348,200
Seeds	237,396	130,841	178,168
Spices	201,573	247,870	335,829
Dyeing and tanning materials	185,657	28,679	26,152
Wood	126,516	49,902	92,521
Silk and manufactures	123,760	31,823	36,265
Shells	114,127	48,027	53,373
Metals	110,827	82,411	114,147
Jute and manufactures	89,273	193,584	137,465
Apparel and boots and shoes	77,196	56,459	74,314
Ivory	73,342	38,102	96,262
Hardware	69,935	26,725	38,307
Chemicals	53,402	71,155	131,074
Glass and glassware	49,655	18,585	31,964
Drugs	49,640	43,711	87,263
Soap	47,118	68,993	153,177
All other articles	1,000,607	840,434	1,099,108
Total	18,258,845	17,010,190	23,622,535

Imports of Cotton Manufacturers Nearly Double in Value.

Cotton manufactures (excluding twist, yarn, thread, etc.) imported into Aden had a value of $8,176,304, an increase of nearly 100 per cent over the substantial figure for the preceding year. This item formed nearly 35 per cent of the total imports and was more than three times greater in value than the import next in importance. Unbleached drills, jeans, long cloth, shirtings, sheetings, chadars, and unspecified gray goods (value $6,226,520) formed 76.1 per cent of the total imports of cottons; colored, printed, or dyed cotton goods (value $1,118,398), 13.8 per cent; and bleached piece goods (value $683,817), 8.3 per cent. Handkerchiefs and shawls in the piece to the value of $31,886, cotton blankets to the value of $28,290, and lace and patent net to the value of $15,834 were the principal items making up the remainder of the cotton textiles imported.

Trade in Unbleached Cottons.

For the first time in many years covered by the trade statistics available to the Aden consulate, the United States has been superseded as the chief supplier of unbleached cotton piece goods to the trade of Aden and the Red Sea district. During the fiscal year under discussion the United States supplied only $849,334 worth of unbleached cotton goods, as against $2,131,445 worth during the preceding year. Unbleached drills, jeans, long cloth, shirtings, and

sheetings supplied by India and Japan in 1916–17 reached a total value of $4,398,149, as compared with $622,114 in the preceding year.

The following table shows the quantity and value of unbleached goods, comprising drills, jeans, long cloth, shirtings, and sheetings, imported into Aden from the chief supplying countries during the years 1913–14, 1915–16, and 1916–17. It is possible that the tremendously increased imports credited from India include also some cottons of American origin, as well as a considerable quantity of Japanese goods. Local importers say that there were in 1916–17 more than the normal quantities of American goods transshipped at Bombay for Aden.

Countries.	1913–14		1915–16		1916–17	
	Yards.	Value.	Yards.	Value.	Yards.	Value.
United States	21,483,270	$1,336,954	39,837,700	$2,131,445	9,941,400	$849,334
India	3,881,556	224,679	10,815,265	622,114	67,723,270	4,398,149
Austria	8,995,510	506,850			87,750	6,026
Italy	560,500	29,490	1,392,150	80,543	423,000	35,960
Germany	406,063	24,610				
United Kingdom	345,961	20,922	396,742	25,532	1,576,839	112,694
All other countries	627,400	44,347	166,550	9,266	1,091,150	94,571
Total	36,300,260	2,187,852	52,608,407	2,868,900	80,843,409	5,497,734

Cotton Goods from Japan Included in Indian Imports.

As may be seen from the above table, which is taken from the Aden Port Trust returns, no mention is made of Japan. It is an absolute certainty that considerable quantities of Japanese gray cottons have been distributed through the Aden market; and many leading importers are of the opinion that the cottons of Japanese manufacture in the Red Sea market during the past year and a half have nearly equaled in value those of Indian manufacture. As all of the Japanese cottons reaching this market are credited to India in the Aden Port Trust returns, that being the country from or through which the largest shipments reach Aden, it is not possible to give even approximately accurate figures covering the importations of these goods. It may be accurately stated, however, that a large number of the importers and dealers in Aden, Jibuti, and Abyssinia are carrying considerable stocks of Japanese cottons in place of their failing supplies of American cottons. It may be said also that Japanese gray cottons are regularly quoted to the trade in many parts of the Red Sea market, where they were practically unknown before the war.

Outlook for American Cottons.

Since the war has cut off or restricted supplies of unbleached cotton piece goods from Austria, Italy, and other European countries, the chief competitors of the United States in the local trade have been India and Japan. While there has been established a substantial demand for Indian gray goods generally they are not equal in color, size, and strength to the American goods and have been at a disadvantage in competition, except in the matter of price, which is not sufficient to balance the other advantages enjoyed by the American cottons. During the past two calendar years, however, the trade has been unable to secure normal supplies of American cottons, and

the insufficient supplies that have been obtained were unduly expensive. The local people must have unbleached cottons, and with the American supply failing they have of necessity bought such substitutes as could be offered by traders.

Competition from Japanese Goods.

The Japanese, with their excellent business foresight, have developed the possibilities of the situation by placing on the market unbleached piece goods in which a special effort has been made to approach as closely as possible the superior color of the American goods. They have succeeded very well in this, and one of their well-known brands now established in this market is almost equal in appearance to the best-known American marks. Local importers say that this has been accomplished by mixing the short-staple Indian cotton with the longer-stapled American or Chinese cotton. The general opinion, however, is that for this reason the Japanese cottons are not as strong as the American and will not wear as well.

It is an established fact that the trade has found the Japanese cottons a fairly satisfactory substitute for the American. If manufacturing costs are left out of consideration, the goods from Japan have better and cheaper transportation facilities to this market than have the American, and that alone is a considerable advantage. This advantage would apparently exist in normal times as well as at present, although perhaps to a lesser degree.

The present situation is that Japanese cottons have established themselves in this market, whereas previously they were comparatively unknown; and that these cottons, together with those of Indian manufacture, have at present a supremacy in the trade which has heretofore been held by American cottons, despite the apparently indirect interest of American manufacturers in the markets.

American Cotton Manufacturers Should Try to Retain Market.

Many dealers are of the opinion that when American cottons are again available at reasonable prices they will immediately reestablish their supremacy, although probably to a smaller extent than before. Other dealers are of the opinion that, unless the American manufacturers take an immediate and direct interest in keeping at least a partial supply of their goods on the market, their former supremacy in the district will be irreparably injured. They realize that prices in America are very high, and that shipping space is both expensive and limited, but they believe that, where there is involved the question of a possibly permanent loss of the lead held in this market for so many years by American cottons, an unusual effort to retain it would be worth the while of the American manufacturers.

The effect of a loss of the leading place held by American unbleached cottons in this market would extend to other branches of American trade. American cottons are sold here with compartively little effort, and by their superior quality have established an excellent reputation for all American manufactured goods. This good advertising has been a great aid to the introduction and sale of other lines of American goods, particularly automobiles, sewing machines, hardware, soap, and starch. It also paves the way for the introduction

and sale of American cottons other than those of the unbleached class, to which in the past there has been devoted apparently too little attention.

Method of Increasing Sales of American Cottons.

Even in normal times the fate of American cottons in this market has been left largely to the efforts of native distributors, whose well-known conservatism has been an obstacle to the fuller and possible expansion of the market. To obtain the best results a more direct interest or intervention by the American manufacturers or exporters was desirable then; and it is doubly desirable under present abnormal conditions. The native merchant controls the market and must, it is true, be depended upon. The point it is intended to emphasize is that the native distributor must be pushed to extend his business; otherwise he simply waits for the substantial orders which he knows will come without seeking, because of the established superiority of the American unbleached cottons. The introduction of new marks or brands is not necessary; an energetic pushing of those already so well known to the native consumers would be eminently more profitable. The distribution to the retail trade should be left with the native importer, but the American manufacturer or exporter should have a direct representative in Aden and in one or two of the more important districts served by Aden, who should see to it that the local distributor makes the most of his advantages. Such a direct representative would quickly understand what quantity his distributors should place; and if the distributors were not willing to make the effort to place the required quantity, there could be found others.

Prices of American, Japanese, and Indian Sheetings.

One of the best known 9-pound American unbleached sheetings on this market was quoted at 267 rupees (rupee = $0.3244) and at 410 rupees per bale in February and November, 1917, respectively. A good quality of American 7½-pound sheeting was quoted at 195 and 325 rupees, respectively, during these two months. A less popular quality of American sheeting, 6½-pound weight, increased from 165 rupees per bale in February to 300 rupees in November.

A popular Japanese 10-pound sheeting of good quality was quoted at 205 rupees per bale in February and at 370 rupees in November of the past year. A Japanese 8-pound sheeting, sold at 140 rupees per bale in February, was quoted at 325 rupees in November.

An Indian 8-pound sheeting of the most popular quality was quoted at 160 rupees in February and at 370 rupees in November, 1917. An Indian 7-pound sheeting was quoted at 140 rupees per bale at the beginning of 1917 and at 310 rupees at the close of the year.

The above prices, which are those quoted by the Aden importer to the local distributor, indicate the great increase in prices during the year just closed. As large stocks were reported on hand at the beginning of the calendar year, it is probable that many importers sold cottons which had cost them the same price at both the February and November rates. At this time (January, 1918) some importers are refusing to sell their present stocks to the trade, anticipating a further increase of prices.

Distribution of Unbleached Cottons Through Aden.

There was a substantial increase in the amounts and values of unbleached cottons distributed from Aden to all its most important local markets.

Abyssinia is by far the most important local market tributary to Aden in both import and export trade. In 1916–17 Abyssinia imported from Aden, principally through Jibuti, 34,389,832 yards of unbleached piece goods, valued at $2,542,873. A small part of these goods may have been diverted to Somali markets before passing into Abyssinia. Massaua imported from Aden during the year under discussion 8,891,167 yards of unbleached piece goods, valued at $596,278; Suakin and Port Sudan, 8,456,700 yards, valued at $530,459; Arabian Red Sea ports, 7,144,150 yards, valued at $573,762; and British Somaliland, 4,835,930 yards, valued at $316,342. Zanzibar and Italian East Africa each imported unbleached cottons from Aden to a value greater than $100,000. The total exports of all classes of unbleached cottons from Aden in 1916–17 were 72,371,517 yards, valued at $5,199,266, as against 57,661,542 yards, valued at $3,033,663, in the preceding year.

Imports of Other Cotton Goods.

Next in importance to the unbleached piece goods are the imports of colored, printed, or dyed piece cottons. The imports in 1916–17 of this class of goods were 12,910,801 yards, valued at $1,118,398, as against 6,726,862 yards, valued at $498,276, in the preceding year. Prints and chintz are the leading colored goods imported, followed by chadars, dhuties, saris, and scarfs. The colored, printed, or dyed cottons came mainly from India, a small part of the whole being from the United Kingdom. The principal markets distributed to from Aden are Abyssinia (via Jibuti), Arabian Red Sea ports, Italian East Africa, Arabian Gulf ports, and British Somaliland.

The class of cottons third in importance is bleached piece goods. In 1916–17 Aden imported 9,097,531 yards, valued at $683,817, as against 5,009,927 yards, valued at $339,043, in the preceding year. Bleached long cloth and shirtings make up approximately two-thirds of the total imports of bleached cottons; sheetings, dhuties, saris, and scarfs are next in importance. The excellent Manchester product controls the local bleached-goods trade, the only other country contributing an appreciable quantity being India. The United States contributed 218,000 yards of bleached drills and jeans in 1915–16 and none in 1916–17. Aden's best customers for bleached cottons during the year under discussion were British Somaliland, Abyssinia (via Jibuti), Arabian Gulf ports, and Massaua. The reason for the large demand for bleached cottons from British Somaliland is that the Somali takes great pride in his dress and will, if at all possible, buy bleached shirtings, while the Arab, Galla, and Abyssinian would be content with the unbleached goods. The Somali sold his skins and hides profitably and had more money than usual during the year discussed.

In 1916–17 the imports of cotton yarn amounted to only 736,075 pounds, valued at $145,649, as against 2,522,798 pounds, valued at $428,861, in the preceding year. Mule and water yarns, uncolored, Nos. 16 to 20, lead in the imports, with Nos. 1 to 10 second. India supplied practically the total imports of yarn during the year under

discussion. Aden exports yarn principally to Abyssinia, where it is used with native-grown cotton in the home-weaving industry.

Goat and Sheep Skin Trade.

Aden imported in 1916–17 a total of 7,289,711 skins, valued at $2,554,105, as against 6,750,651 skins, valued at $1,698,614, in the preceding year. Between 5 and 10 per cent of these totals was represented by unspecified skins, the remainder being goat and sheep skins.

The increase in value was proportionately much greater than the increase in quantity. This was caused mainly by greater demands from abroad, which induced speculation in the local market and a consequent bidding up of prices to a figure in some cases double that normally paid. According to information given to the Aden consulate by local dealers, as high as 55 rupees per score was bid during the active season last winter. The same skins sold a few months previous for 20 rupees per score, and the present price is about 23 rupees per score, although the market is at present quite inactive owing to lack of shipping space. Some thousands of bales of goatskins were purchased and shipped during the year 1916–17 at prices above 35 rupees per score. During the winter of 1916–17 the skin business in Aden enjoyed one of the most prosperous seasons in the history of the trade.

Exports of Goat and Sheep Skins.

Normally more than half the goat and sheep skins exported from Aden each year go direct to the United States. In 1914–15 approximately two-thirds of the skins exported went directly to America. In addition to the direct exports there are appreciable quantities that go first to the United Kingdom or European countries and are reexported to America. During the year under review the purchases in this market by American importers exceeded previous years. The direct exports were unusually large, and, owing to shipping conditions and the inability to get through bills of lading, many consignments for the American market were shipped to the United Kingdom and transshipped. Such shipments are, of course, credited in the Aden Port Trust returns as exports to the United Kingdom. Exports to the United Kingdom increased largely over the preceding year as, in fact, to all countries to which Aden skin shipments normally go.

The following table shows the exports of goat and sheep skins from Aden during 1913–14, 1915–16, and 1916–17. Of the total in 1913–14, sheepskins numbered 1,853,523, valued at $769,637; for 1915–16 they numbered 2,182,911, valued at $818,678; and for 1916–17 there were 2,433,692, valued at $1,409,570.

Countries.	1913–14		1915–16		1916–17	
	Pieces.	Value.	Pieces.	Value.	Pieces.	Value.
United States	3,463,848	$1,409,803	3,773,726	$1,409,690	3,843,494	$2,131,246
United Kingdom	967,586	437,662	1,586,861	527,719	2,339,430	1,614,366
France	969,407	325,405	118,250	43,236	115,420	58,150
India	503,645	50,685	312,475	31,137	428,665	50,672
Italy	77,701	32,153	33,140	13,037	140,745	59,870
All other countries	139,500	50,871	.....	.....	33,856	28,191
Total	6,121,690	2,306,579	5,824,452	2,024,819	6,901,610	3,942,495

In addition to goat and sheep skins, exports of unspecified skins, mainly gazelle or "dik-dik" skins, in 1913–14 amounted to 1,323,921 pieces, valued at $97,139; in 1915–16 to 598,270 pieces, valued at $35,427; and in 1916–17 to 1,812,655 pieces, valued at $118,511.

Trade in Hides.

Imports of hides into Aden during the official year 1916–17 amounted to 375,794 pieces, valued at $909,709, as compared with 340,646 pieces, valued at $684,094, in the preceding year. While the trade in hides increased during the year under discussion, it is still below normal, the annual imports during the years before the war amounting to approximately 500,000 pieces. There was an increase in the imports from Italian East Africa, Abyssinia, and Massaua, although it is understood that there was also an increased direct export of hides from those places to European markets.

Exports of hides from Aden in 1916–17 amounted to 420,021 pieces, valued at $1,107,740, as compared with 372,986 pieces, valued at $958,815, in the preceding year. Exports to the United Kingdom and India increased largely, but those of Italy decreased considerably, presumably because of the increased direct exports to that country from Jibuti and Italian Red Sea colonies. Shipments of hides from Aden to the United States are usually unimportant, probably for the reason that American tanners find the hides from this district too light for their purposes. In 1916–17 American buyers took 1,161 hides, valued at $3,562, as compared with 2,887 hides, valued at $6,618, in the preceding year.

The Coffee Trade.

Aden's coffee trade decreased considerably during the year 1916–17. Imports were valued at $1,144,195, whereas during the preceding year they had a value of $1,868,476. In normal years the imports of coffee at Aden average more than $2,000,000 in value. During the year imports of Mocha coffee very largely decreased on account of the port of Hodeida being closed and some interruption to inland caravan routes by military operations.

The crops of Mocha coffee have been reported good for both the 1916–17 and the 1917–18 seasons, and as the supplies that have come into Aden for export have been below normal, it may be presumed that there are considerable stocks of coffee in the interior that are being held because of inability to send them out to the seaports. Figures showing arrivals during the current official year are not yet available, but local dealers are of the opinion that the arrivals have been heavier than they were during 1916–17. There have, however, been practically no arrivals of the Mathari-Hemi and other finer grades of Mocha coffee during either the current season or that of 1916–17. From this it may be presumed that when transportation facilities with the interior are again normal there will be large stocks of the finer grades of Mocha offered for export.

Harrar Coffee in Demand.

Harrar coffee, grown in the Abyssinian Province of that name, normally comes into the Aden export market in considerable quantities via Jibuti and British Somaliland ports. Harrar coffee is often called "long berry Mocha" in the Aden market. It is a longer bean than

the genuine Mocha, but is considered by many people as quite equal in aroma and flavor to the latter. The prices of Harrar coffee in the Aden market are very little different from those of the good grades of Mocha. During the past two years there have been increased exports of Harrar coffee direct from Jibuti to European markets, and the amount handled in the Aden market has accordingly decreased. This was due to more shipping space being available at Jibuti for coffee shipments than at Aden. The Harrar coffee crop for the seasons of 1916–17 and 1917–18 was good, and prices during the current season have been very good in Harrar and Dire-Dawa, the principal Abyssinian towns from which this coffee is sent to the export markets.

Abyssinian coffee, which is mainly the product of the wild coffee trees in that country, comes into Aden in small quantities via Jibuti and Massaua. It is not so good as the Harrar coffee and finds its best market in the Sudan and Egypt, where cheaper coffees than the Mocha and Harrar are in demand.

Increased Receipts from Somali Ports.

There were increased receipts of coffee from Somaliland ports, which presumably came down to the coast from the Harrar district by caravan. Before the completion of the Franco-Ethiopian Railroad to Dire-Dawa, there was a larger coffee trade by caravan from Harrar Province to Somaliland ports. It is, however, an interesting fact that this caravan trade seems again to be developing, as the imports of coffee from British Somaliland have steadily increased during the past five years. Imports of coffee from Somaliland in 1916–17 were nearly four times those in 1912–13. [The Aden coffee market was discussed in detail in COMMERCE REPORTS for July 20, 1917, and Jan. 26, 1918.]

In 1916–17 Aden imported 6,002 hundredweight (112 pounds to the hundredweight) of coffee, valued at $65,615, from the Straits Settlement. Most of this was probably Java coffee, and it was possibly reexported as coffee originating in this district. There is no reason to believe that much of it could have been consumed here.

Coffee Imports and Exports by Countries.

The United States is normally the leading market for Aden coffee, with France as the next important market. American purchases during the year under review, however, decreased to practically one-fifth of the amount and value taken in the preceding year. The United Kingdom and France each purchased more coffee from Aden than did the United States, although it is probable that some of the exports to the United Kingdom were transshipped to America.

Coffee prices in Aden have been low during the past calendar year, although that commodity has not been so much affected by limited shipping space as have other important exports from Aden. Coffee is known as "clean" cargo and can be shipped often when there is no space available for hides or skins. During the current official year there has been a fair movement of coffee to export markets, although the shipping of hides and skins has been in very limited quantities.

The quantity and value of coffee imported into and exported from the port of Aden, by countries in 1913–14, 1915–16, and 1916–17 are shown in the following statement:

Countries.	1913–14		1915–16		1916–17	
	Hundred-weight.	Value.	Hundred-weight.	Value.	Hundred-weight.	Value.
IMPORTS.						
Mocha	13,853	$208,042	57,067	$921,991	5,180	$74,514
Abyssinia	54,612	861,615	50,636	755,167	40,440	570,724
Somaliland	1,724	32,956	2,591	42,695	3,519	56,308
Straits Settlements	3,301	19,799	2,854	21,136	6,002	65,615
India (Bombay)	1,334	3,757	2,660	14,283	1,322	8,058
Hodeida	50,619	813,408	96	1,443		
Gaizan					26,562	356,248
All other countries	2,100	17,438	9,835	111,761	951	12,728
Total	127,543	1,957,015	125,739	1,868,476	83,976	1,144,195
EXPORTS.						
United States	38,394	704,524	42,667	962,217	9,018	186,512
France	26,570	503,229	26,190	553,326	11,581	232,493
Africa and adjacent islands	21,345	293,714	25,217	393,816	33,099	461,773
United Kingdom	5,223	116,169	9,280	190,702	12,508	239,870
Spain	4,807	91,835	4,510	92,675	565	10,804
Italy	7,247	139,346	4,130	85,497	3,868	76,385
Arabian Gulf ports	7,610	69,702	8,267	70,353	4,487	29,904
Australia	1,985	40,163	1,804	38,170	1,550	30,637
All other countries	25,841	409,387	6,107	76,302	6,777	98,930
Total	139,022	2,368,069	128,172	2,463,058	83,453	1,367,308

Tobacco, Cigarettes, and Cigars.

There was a large increase in the imports of unmanufactured tobacco, much of which was for use in the local cigarette industry. Supplies of Turkish and Greek tobacco, which are used for making cigarettes, could not be obtained and as a consequence the imports of Indian tobacco largely increased. Considerable tobacco is produced in the part of Arabia to the east of Aden, and it is exported to Aden through Makallah and other Arabian Gulf ports. A large share of the Indian tobacco was reexported to Jibuti, Massaua, and Egypt, as those places, as well as Aden, were unable to secure the normal supplies of Turkish and Greek tobacco for their cigarette industries. Total imports of unmanufactured tobacco in 1916–17 amounted in value to $749,339, as compared with $699,859 in 1915–16.

A remarkable feature of the cigarette trade was the importation during 1916–17 of 262,309 pounds of cigarettes, valued at $134,690, which came mostly from England. During the preceding year the imports of cigarettes were 67,451 pounds, valued at $29,150, but previous to that the imports of cigarettes were comparatively unimportant. This remarkable increase in imports of foreign-made cigarettes is accounted for by the needs of the troops stationed at Aden.

In 1916–17 Aden exported cigarettes to the value of $140,614, principally to India. It is not possible to state what part of the exports was transshipment cargo, and what part was produced locally, but it is believed that possibly one-third of the total exports was of local production. Aden has a number of small cigarette factories, mainly operated by Greeks and Arabian Jews.

Total imports of cigars decreased, but imports of Philippine cigars amounted to $1,424 in value, as compared with a value of $666 during the preceding year. Imports of Philippine cigars are steadily increasing and are taking the place of the Indian cheroots, which until recent years were the principal cigars sold in Aden.

Coal Trade—Imports of Sugar and Confectionery.

Aden as a shipping port and naval station imports large quantities of coal. Owing to the fact that a smaller number of merchant ships call for bunkers than in peace times, the quantity imported has decreased, but the value has very much increased. In 1916–17 there were 90,047 tons imported, valued at $2,322,735, as compared with 125,509 tons, valued at $1,407,859, in 1915–16. Less Welsh coal was imported, but greater quantities of Indian and Natal coal. Exports of coal from Aden, except in ships' bunkers, are negligible.

Imports of sugar increased largely, both in quantity and in value. The total imports in 1916–17 were 104,252 hundredweight, valued at $695,796, as compared with 79,081 hundredweight, valued at $481,442. Before the war the bulk of the sugar imported into Aden came from Austria, but since supplies from that source are no longer obtainable they come mainly from India. Mauritius usually contributes a certain amount of sugar to local imports, but during the year under review none came from that source.

Aden normally imports about $50,000 worth of confectionery, but imports have steadily declined since the year in which the war began. In 1916–17 Aden imported less than $15,000 worth of confectionery. The market would use a great deal more if additional supplies could be obtained and delivered. [The Aden market for confectionery was discussed in COMMERCE REPORTS for Nov. 1, 1917.]

The most important local markets to which sugar is distributed from Aden are the Turkish Yemen, British Somaliland, and Abyssinia, which places in 1916–17 took 52,382 hundredweight, valued at $355,460.

Decreased Receipts of Kerosene.

Receipts of kerosene decreased from 1,137,744 gallons, with a value of $304,285, in 1915–16, to 565,304 gallons, with a value of $173,623, in 1916–17. American kerosene formed 97 per cent of the imports, and most of the remaining 3 per cent came from Sumatra, which normally supplies a somewhat greater percentage. The principal exports of kerosene oil from Aden go to Arabian Red Sea Provinces, and to British Somaliland and Abyssinia (via Jibuti). As in the case of other staple commodities, the decreased imports in 1916–17 were due more to inability to make larger deliveries from abroad than to a decreased local demand or consumption.

Gums and Resins Increase in Value.

Gum arabic, frankincense, and myrrh are among the more important natural products of this district. The market during 1916–17 was excellent, and the prices paid were very good. Owing to conditions affecting the collection of the gum and its transportation to Aden for export, smaller quantities were handled than during the preceding year, but the total value increased.

The principal contributions of gum arabic to the Aden export market are from British Somaliland and independent Somali ports. Smaller quantities come from Massaua and from Arabian Red Sea ports. About 50 per cent of the total exports go usually to India, and France takes a good share of the balance. Small quantities go each year to Great Britain, and during the year under discussion a little more than 10 per cent of the total exports went to Italy; there were no exports to the latter country during the three preceding

years. An interesting feature of the gum arabic trade during 1916–17 was the appearance for the first time of the United States in the list of countries to which exports are made. Only 240 hundredweight went to America, but it is possible that a permanent trade may develop from the start which has been made.

Gum olibanum, or frankincense, reaches the Aden market almost exclusively from independent Somali ports and from Arabian gulf ports. It is the most important gum in the local market, both in quantity and in value. Frankincense is exported in largest quantities to India, the 1916–17 shipments being the largest in many years. Exports to France increased; those to Abyssinia, which is normally one of the regular markets, decreased. Egypt usually takes an appreciable quantity, but during the year under review no exports to that country are recorded. This aromatic gum is used largely in religious ceremonies in the countries named and for disinfection. There were no exports to the United States.

Gum myrrh is next in importance in the gum trade. The principal imports into Aden are from independent Somali ports. The largest exports during 1916–17 were to Egypt, with India next, and the United States third. The latter country took nearly three times as much of this gum from Aden as in any previous year, and indications are that a permanent trade is developing. Gum myrrh is well known for its medicinal properties and for its use as a basis of perfumery.

Comparatively unimportant quantities of gum benjamin (benzoin) are imported from India and the Straits Settlements for distribution in the local Red Sea markets.

Imports and Exports of Gums.

The following table shows exports and imports of the principal gums handled in the Aden market in 1913–14, 1915–16, and 1916–17. Gum myrrh is not listed separately in the Aden Port Trust returns, but it is probable that the item of "all other" is made up largely of this gum.

Gums.	1913–14		1915–16		1916–17	
	Hundredweight.	Value.	Hundredweight.	Value.	Hundredweight.	Value.
IMPORTS.						
Olibanum (frankincense)	28,926	$118,788	28,999	$87,602	24,752	$112,076
Arabic	8,272	47,477	11,576	84,948	10,108	90,483
Benjamin	1,215	15,085	296	6,245	593	11,649
All other	23,262	112,543	22,659	81,711	17,573	71,317
Total	61,675	293,893	63,530	260,506	53,026	285,525
EXPORTS.						
Olibanum	33,331	177,132	29,590	113,911	31,154	167,714
Arabic	9,904	65,367	11,718	115,683	10,043	104,067
Benjamin	885	9,980	342	3,762	351	4,515
All other	20,581	133,339	16,308	92,534	14,806	78,460
Total	64,701	385,818	57,958	325,890	56,354	354,756

The Trade in Civet.

The Aden Port Trust does not supply separate figures for the trade in civet, but groups it under the head of perfumery. The

total imports of perfumery in 1916–17 were valued at $31,906, against a value of $27,279 in the preceding year. Probably 90 per cent of this total was Abyssinian civet imported via Jibuti.

The total exports of civet were approximately $30,000 in value, of which about 70 per cent went to France and nearly 25 per cent to the United States. During the preceding year 60 per cent of the total exports were to the United States. Civet is widely used as a basis for many kinds of perfumery.

Hardware and Cutlery—Glass and Glassware.

Imports of hardware increased principally in the items of metal lamps from the United States and India (imports from the latter country probably being made up largely of a well-known American hurricane lantern); in galvanized iron buckets from the United Kingdom; in builders' hardware from India; and in enameled ironware from the United Kingdom and India. Imports of cutlery increased from the United Kingdom, India, and the United States. The Red Sea market for hardware and cutlery is constantly growing, but owing to war conditions the imports have not been sufficient to meet the demand. Since the usual supplies from the United Kingdom and Europe have been restricted, there have been larger amounts from India and Japan. There is an excellent market for American hardware, which is already well known in this district, if deliveries could be made.

A well-known American hurricane lantern is very popular in this market; in 1916–17 the imports of this lantern increased both directly from the United States and via India. War conditions have forced the price of this article to a figure beyond the reach of many natives who would like to buy it, but when conditions are again normal there should be an excellent business done in American hurricane lanterns. The Abyssinian market in particular appears to be expanding.

Imports of glassware in 1916–17 were almost double those for the preceding year, the principal increases being in beads and false pearls from India, Italy, and Austria (captured cargo); in soda-water bottles collected in Somaliland; in tableware from India; and in other glassware from the United Kingdom, India, and Japan. There were no imports of plate and sheet glass, although there is a market for it. Total imports of glass and glassware were valued at $31,964.

Gunny Sacks—Wearing Apparel—Boots and Shoes.

Aden imports considerable quantities of gunny sacks from Calcutta for distribution to the local coffee-producing districts. These sacks have various other uses as containers and are also used in baling skins for export. The imports decreased largely in 1916–17, being valued at $121,072. Principal exports were to Suakin and Port Sudan, Egypt, and Abyssinia.

Imports of wearing apparel in 1916–17, excluding hosiery and boots and shoes, increased by approximately 50 per cent, mainly from the United Kingdom, India, Japan, and Italy. Imports of hats decreased, mainly from Italy.

Boots and shoes of leather, valued at $4,481, and those of materials other than leather, valued at $16,983, were imported mainly from the United Kingdom. There is not much promise of a large market for

shoes in this district. The native population generally does not wear anything more than sandals; the climate is dry and hot, and protection for the feet is not a necessity. The limited imports of boots and shoes are used principally by the small European population, and by a few of the wealthier natives. Some American shoes, of a well-known make, have reached local shopkeepers through English exporting houses and are well liked.

Ivory Trade of Aden.

Aden imported 42,880 pounds of ivory in 1916–17, valued at $96,262, as against 18,660 pounds, valued at $38,102, in the preceding year. Imports in 1916–17 were greater than for any one of the past five years. Practically all of the ivory received was from Abyssinia via Jibuti. Over $6,000 worth came out through Massaua, presumably from Abyssinia.

The ivory trade of Aden was once of considerable importance, but has declined during the past several years. The principal exports of ivory through the Aden market are normally to the United Kingdom and to the United States, but during the year under review the bulk of the exports went to India. For the first time in many years none went to the United States. The total exports from Aden in 1916–17 amounted to 26,768 pounds, valued at $57,115, which is considerably less than the imports. There is no ivory consumed in Aden, but the excess of imports over exports is represented by stocks which are being held for safer and more convenient shipping facilities. The present high freight and insurance rates to Great Britain and the United States are such that the local exporter could realize little if any profit.

Exports from Aden.

Aden's commercial importance is as a port of transshipment, and, as its own production or consumption amounts to very little, the rise and fall of imports is necessarily reflected in the exports.

Owing, however, to the present disturbed condition of the world's markets Aden imported in 1916–17 a somewhat greater amount of merchandise than usual in excess of the immediate needs of the local markets to which it distributes. The balance of imports over exports (merchandise) was accordingly about $3,300,000, or approximately a million dollars greater than the normal balance.

During 1916–17 the total exports of merchandise by sea had a value of $20,292,002, an increase of $5,497,525 over the preceding year. In 1915–16 the United States ranked first in Aden's export trade but fell to third place during the year under review.

The following table gives the value of the leading items exported from Aden during the three fiscal years ended March 31, 1914, 1916, and 1917:

Articles.	1913–14	1915–16	1916–17
Cotton manufactures (excluding twist)	$2,841,676	$3,941,552	$6,652,611
Skins, raw	2,408,674	2,060,246	4,061,006
Coffee	2,368,069	2,463,058	1,367,308
Grain and pulse	1,871,066	1,106,005	1,449,738
Hides, raw	1,469,455	958,815	1,107,740
Tobacco	778,606	601,828	1,185,597
Sugar and confectionery	450,328	382,992	576,318
Gums and resins	386,025	326,611	354,756
Salt	256,477	323,934	373,836
Articles by post	223,992	191,537	171,071

Articles.	1913–14	1915–16	1916–17
Provisions	$223,351	$138,869	$253,906
Spices	216,158	213,291	442,838
Cotton twist, etc	207,605	289,816	178,639
Jewelry and pearls	196,504	133,475	256,433
Oils	187,504	271,941	193,987
Dyeing and tanning materials	162,368	33,451	45,597
Shells	124,538	55,292	50,495
Silk and manufactures	97,667	24,436	46,389
Seeds	83,592	35,148	37,465
Ivory	79,203	40,877	57,115
Jute and manufactures	53,567	184,782	134,918
All other articles	1,192,571	1,016,530	1,294,239
Total	15,878,996	14,794,477	20,292,002

Trade With United States.

The following table, compiled from the Aden Port Trust returns, shows the quantity and value of the principal articles, in the order of their importance, imported from and exported to the United States during the fiscal years ended March 31, 1914, 1916, and 1917:

Articles.	1915–16		1916–17	
	Quantity.	Value.	Quantity.	Value.
IMPORTS.				
Unbleached cotton sheetings, yards	36,798,700	$1,964,738	9,399,650	$817,067
Kerosene, gallons	1,406,224	298,540	548,808	168,321
Unbleached long cloth and shirtings, yards	1,710,250	80,297	.....	.....
Unbleached drills and jeans, do	1,328,750	83,782	.....	.....
Other unbleached cottou goods, do	668,870	41,490	512,250	32,264
Motor cars and cycles, number	58	32,601	17	17,496
Mineral oils, gallons	57,237	22,429	33,954	16,344
Bleached drills and jeans, yards	218,600	13,112	1,567	486
Laundry soap, hundredweight	1,478	11,776	3,290	31,430
Bleached long cloth and shirtings, yards	192,500	8,908	.....	.....
Starch, hundredweight	2,086	7,961	.....	.....
Chemicals	.....	7,674	.....	5,361
All other articles	.....	22,292	.....	25,206
Total	.....	2,595,600	.....	1,113,975
EXPORTS.				
Goatskins, number	2,767,471	961,182	2,720,923	1,486,732
Coffee, hundredweight	42,668	962,217	9,018	186,513
Sheepskins, number	1,006,255	446,770	1,122,569	644,514
Ivory, pounds	6,485	17,583	.....	.....
Gums and resins, hundredweight	152	2,138	585	9,249
Perfumery	.....	21,238	.....	7,567
Shells, hundredweight	473	8,228	.....	.....
Cowhides, number	2,837	6,610	1,161	3,562
Natural science specimens	.....	972	.....	588
Senna, hundredweight	.....	.....	228	3,713
Apparel	.....	520	.....	.....
Tobacco, pounds	.....	.....	49,280	17,822
All other articles	.....	306	.....	.....
Total	.....	2,427,764	.....	2,360,260

American Trade Shows Large Decrease.

The year 1916–17 was one of the poorest in the history of American trade with the Red Sea district. Imports of American goods decreased to less than half the imports during the preceding year, and there was a small decrease in the export trade to America. The principal cause of this setback to American trade was expensive and limited shipping facilities. It is also believed that the tremendous falling off in imports of American goods was partly due to the lack of sufficient direct effort on the part of American exporters to supply the demand for American goods that has been developed in this dis-

trict. There has been no lack of a demand in this district for manufactured goods. A great deal of the increased imports of manufactured goods came from the United Kingdom, India, and Japan. Many local importers who have done a large part of their business heretofore in American goods found that they could not get their needed supplies from America and have had to handle goods of other manufacture, principally Indian and Japanese, in order to supply their customers who do the retail distributing. It is natural to assume that these firms will now permanently handle an appreciable quantity of these new lines at the expense of the competing American goods. This situation has occurred not only during the year under review, but is thought to have continued during the current year. The local importers want American goods but can not get them.

Unbleached Piece Goods.

Imports of unbleached cottons of American origin into Aden have rarely fallen below 60 per cent of the total. In 1915–16 American drills, jeans, shirtings, long cloth, and sheetings made up 75 per cent of the total; in the year under review they were less than 15 per cent. No American drills, jeans, shirtings, or long cloth were imported during the year 1916–17, although about $163,000 worth came in during the preceding year.

The native consumer asks his dealer for American gray goods and is told that there are none. He is given Japanese, Indian, or Italian goods, and must take them unless he expects to do without clothing, which his pride, if not the climate, demands. This has happened one year and probably is happening now for the second year. Just how long this may continue before his favor is definitely transferred from the American goods he has used for so many years is conjectural; but it would seem that it has already continued a sufficient length of time to injure the established market for American goods.

The dealer usually pays more for the cottons made in America, and if he can establish the goods of other nationalities, upon which his margin of profit is presumably greater, it is easy to see what his future preference will be. The dealer heretofore has handled American cottons because his trade demanded them, and he continues to want American cottons because his customers still demand them. The average native customer does not mind paying a little more for "Americani" if he can get the kind he wants. The demand and the preference for American gray piece goods is dying hard and can yet be retained, if American manufacturers can be convinced that it is to their interest to make every possible effort to place a few thousand bales with the local distributors. The local importer will need little, if any, persuasion to buy if the goods can be delivered without unreasonable delay and at prices not unreasonably high. It may not be entirely convenient to supply this market at this time, but it is obvious that it should be done for the future interest of the trade.

American Kerosene—Increased Imports of Laundry Soap.

Kerosene is next in importance to the unbleached piece goods. Imports in 1916–17 fell to less than one-half the quantity for the preceding year. This was also due to limited shipping facilities, but the deficit, unlike that in the cotton-goods trade, was not made up

from other sources. The market for this commodity is expanding, particularly in Abyssinia, and the American manufacturer should not overlook its importance.

One feature of local trade favorable to American goods was the greatly increased imports of laundry soap from the United States. In 1913–14 the imports of American laundry soap amounted to only $646 in value; they practically doubled in the following year; and in 1915–16 they reached a value of $11,776. During the year under review the imports of American soap reached the considerable value of $31,430. The market is normally supplied almost entirely from France, but during the war imports from that country have not been available, except in greatly reduced quantities. During the year 1916–17 the deficit was made up by largely increased imports from the United States, the United Kingdom, and India.

The toilet soap market is not nearly so important, and also is normally largely supplied from France. Most of the supplies during the past two years have come from the United Kingdom and India. Total imports in 1916–17 had a value of $4,267, which is somewhat larger than the average annual imports.

Other Classes of American Goods in Aden Market.

In addition to the import items listed in the foregoing table of Aden imports of American goods, there were imported in 1916–17 small quantities of canned and preserved provisions, canned milk, lubricating oils, glass and metal lamps, motor-car accessories, parts of launches, and hardware and cutlery. The possibilities for increased trade in all of these lines are good, and so far as can be learned the American goods are liked and wanted.

Promising Market for Motor Vehicles.

Aden is a promising, although comparatively limited, market for motor vehicles. Out of a probable 200 cars at present registered in Aden approximately 75 per cent are of American makes. A large share of the lesser number of motorcycles in use here are also American machines. In 1915–16 there were imported into Aden 58 American motor cars and cycles; in 1916–17 the imports were 17 in number, with a value of $17,496. During the past calendar year the importation of motor vehicles has been prohibited by Government order, and it is probable that this prohibition will continue in effect as long as the war lasts. When it is removed there should be a sale for a number of popular-priced American cars.

There are three parts of Aden: the first known as Steamer Point, where are located the landing stages for ships' passengers, the hotels, shipping offices, and consulates; the second known as Maala, 2½ miles from Steamer Point, where are located the wharves and warehouses of the port; and the third known as Aden Camp, which is 2½ miles beyond Maala, or 5 miles from Steamer Point. Aden Camp is the principal part of the port and has the greatest population, as well as many of the principal business houses. Between these various parts of Aden there is much travel and motor cars do a profitable business carrying passengers. The legal rate per mile for a car is 8 annas (about 16 cents). If one person occupies a car he pays the entire charge, if more than one passenger is carried, as is usually done, the tariff is prorated. At present only ordinary small touring cars are used for this traffic, but it would seem that motor busses

carrying several passengers would be a paying proposition if some local business man could be interested to take the matter up. Across the isthmus from Aden is the Arab town of Sheikh Othman, 10 miles distant, and motor cars also ply for hire between that place and Aden.

As very few new cars have been imported in the past two years, most of the many cars engaged in the taxi business are in a bad state of repair, and the service is inadequate for the needs of the port. This condition is favorable to the sale of new cars whenever the importation may again be permitted.

There are no first-class facilities for the repair of motor vehicles in Aden, and a good repair garage would be a paying proposition, if operated in connection with the sale of cars, tires, and accessories.

Business Opportunities in Aden.

In addition to a first-class motor garage and repair shop, there are a number of business opportunities in Aden. The port has no newspaper, either daily, weekly, or monthly. There are some printing establishments which do work on a limited scale. A comparatively small printing plant, with facilities for doing in an up-to-date manner ordinary commercial and news printing should do well, and the establishing of a newspaper in connection therewith would be a possibly profitable venture.

It is the general opinion that a small modern department store, or an American 5-and-10-cent store, would do a good business in Aden. A good cinematograph show would undoubtedly be profitable. There are at present three in the port, but they are not equipped to make the most of the possibilities.

Other Aden needs are an electric light plant, an electric street railway, and waterworks. It is understood that these matters are under consideration for definite attention at the close of the war.

Steamship Accommodations Limited Since the War.

In normal times Aden is a port of call for a large number of shipping lines, as many as 42 being listed in the year before the war. Some of these services have ceased entirely, and all others have been much reduced so far as the carrying of passengers and commercial cargo is concerned.

Before the war there were several lines of British steamers on the American-Indian route which carried cargo direct between America and Aden. The American and Indian lines of the Clan, Ellerman & Harrison Joint Service, the Barber Line, the Andrew Weir & Co., the Ellerman & Bucknall Steamshiu Co., and several others afforded direct cargo service between Aden and American ports.

During the past calendar year there has been little opportunity to make direct shipments either way. Export cargo for America now goes generally to Italy or England for transshipment, and import cargo comes to Bombay for transshipment to Aden. This is a long and expensive route. Freight rates both ways have increased very much; in some instances during the past year quotations have been 10 times the pre-war rate.

There is need of a direct American steamship line to India, which could call at Aden. Whether or not such calls would be profitable may be judged from the following statement of the amounts of cargo carried direct between Aden and American ports during 1915–16:

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Imports—Cotton textiles, 40,923,070 yards; kerosene, 1,406,224 gallons; mineral oils, 57,237 gallons; motor cars and cycles, 58; and starch, 104.3 tons. Exports—Coffee, 2,134.4 tons; goat and sheep skins, 2,358.55 tons; hides, 14.45 tons; and ivory, 2.4 tons. This is direct cargo and it is reasonably certain that there was an appreciable quantity of indirect cargo, which would be shipped direct if sufficient space were available. It is understood that a direct service between America and Aden, via Indian and African ports, has already been started by ships flying the American flag. It is also understood that the Pacific mail boats come as far as Colombo, which is only 2,093 miles from Aden.

Shipping Conditions Unfavorable to American Trade.

Since the war conditions of shipping have been distinctly unfavorable for American trade with the Aden-Red Sea district, and the establishing of a direct service by American ships would be an improvement even over the conditions that prevailed in normal times. Aden importers and exporters would be glad to organize their business so as to give a definite monthly cargo. There is always a lot of freight moving between Indian and American ports, to which could be added the considerable Aden-Red Sea business.

Aden has a good harbor and very fair shipping facilities. Owing to the present somewhat disorganized condition of the shipping lines which normally carry freight between American ports and Aden, there is very little useful or accurate data to be given relative to the length of voyage, rates, etc. In normal times cargo can reach Aden from New York in 30 days, but it is probable that any shipments made at this time would average from three to six times that period.

In 1914–15 the number of ships entering Aden from American ports was 20, and the tonnage 70,145; in 1915–16 there were 19 ships, with a tonnage of 63,764 tons; and in 1916–17 there were 3 ships, of 10,732 tons. In 1916–17, 4 ships cleared for American ports, against 6 in 1915–16, and 10 in 1914–15.

Shipping Returns—Declared Exports to United States.

The following table, taken from the Aden Port Trust returns, shows the nationality and number of merchant vessels that entered the port of Aden during 1913–14, 1915–16, and 1916–17:

Nationality.	1913–14	1915–16	1916–17	Nationality.	1913–14	1915–16	1916–17
British	767	570	476	Italian	84	94	61
British Indian	172	85	51	Norwegian	4	13	17
Austrian	151	.....	.....	Russian	19	1	1
Japanese	.....	16	54	All other	17	15	24
Dutch	18	15	6				
French	117	92	92	Total	1,529	901	782
German	180	.....	.....				

The total declared value of articles invoiced at the consulate at Aden for shipment to the United States during the calendar year 1917 was $2,196,899, as compared with $3,276,221 for the preceding year. The chief items were: Skins, worth $2,072,888, against $2,844,041 in 1916; coffee, $33,326, as against $385,765; civet, $10,753, against $21,973; senna, $42,407, against $9,559; and mother-of-pearl shells, $26,341, against nothing in the preceding year.

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